



Help your teams grow:

PERFORMANCE IMPROVEMENT PLAN TEMPLATE





When people are struggling to meet the expectations of their job, it's HR's task to help them get back on track.

That means identifying what's been going wrong, and laying out clear, measurable goals for improvement. Depending on the situation, it may also be necessary to provide additional motivation by detailing the potential consequences of output remaining static.

This is where a performance improvement plan (PIP) comes in. It's a structured document that outlines specific areas of concern regarding someone's performance. A PIP helps both employers and professionals move forward, by detailing an organized approach to **performance management**, free from ambiguity.

An effective PIP will identify problems, set expectations, and chart actionable steps the individual can take to close performance gaps. The plan may also outline the consequences if they do not meet the objectives, helping to align the individual's goals with the wider team's objectives and giving a sense of purpose and direction.

Most usefully, a PIP encourages open communication, fostering collaboration as you work through any issues together. It provides a clear measurement of the improved performance you wish to see, giving everyone a better chance of achieving that outcome.

In this guide, we're going to look at how to write a PIP and share a downloadable employee performance improvement plan template for you to customize.





Why use a performance improvement plan template?

Starting your own performance improvement plan from scratch can be a time-consuming task. Instead, a template can save you time and help you treat PIPs equitably across your organization.

Using a PIP template helps to improve your:

- **Consistency.** A template ensures your teams will follow a structured and consistent format for creating PIPs throughout the business. This makes sure that everyone is treated fairly and that no important elements are overlooked.
- **Efficiency.** Using a template saves your team time and effort, especially when dealing with multiple employees or creating PIPs regularly. It provides a starting point, reducing the need to build a plan from nothing each time.
- **Clarity.** Our PIP template provides clear sections for identifying performance issues, setting expectations, outlining action plans, and specifying consequences. This makes it easy for everyone to understand and follow the plan.
- **Customization.** The basic structure provided by a performance improvement plan sample allows team members to customize it to suit the specific needs of each employee and situation.
- **Professionalism.** Establishing an organization-wide template allows you to unify the design and format of each PIP, making them feel more professional and supporting a more coherent approach to performance improvement.
- **Documentation.** Any **HR process** around a performance issue requires comprehensive documentation for legal purposes. A PIP template encourages your people to keep a record of issues, expectations, steps, and outcomes, and can be a valuable progress-tracking and reference resource for future evaluations or reviews.
- **Training.** Templates can be used as training tools for HR personnel and managers, helping them understand the key components of a PIP, any specific details unique to yours, and how they can create one when needed.
- **Accountability.** A PIP template makes everyone involved in the performance review process accountable, with signatures and notes to reflect everyone's agreement to follow the process laid out.

Effectively establishing a PIP template at your organization helps to streamline your HR processes, ensures consistency and accountability, and provides a clear structure for team members and managers alike to follow.

Key components of a performance improvement plan

The best performance improvement plan templates tell the story of a performance evaluation. Make sure your PIP plan includes the following components:

- **An identification of performance issues.** Your PIP should clearly specify the areas of the team member's performance that require improvement, using examples and data where relevant.
- **A clear set of expectations.** Measurable expectations for improvement make the process crystal clear for everyone involved. Make sure your PIP outlines what success looks like in each area requiring improvement.
- **An action plan.** An effective action plan details the steps required for the employee to meet the performance expectations, providing a time frame for each step.
- **A monitoring process and next steps.** The impact of a PIP needs to be measured, so it should include notes on how progress will be monitored, including the frequency of evaluations and who will provide feedback. It's also useful to include a description of the expected next steps, depending on whether the individual meets the PIP's objectives by the end of its applicable period.





Crafting an effective performance improvement plan

Crucially, a well-crafted performance improvement plan aims to improve someone's work rather than punish them. This means it's important to communicate the grounds for instigating the PIP openly and to establish achievable outcomes.

Done right, you're more likely to help people reach their full potential and provide a positive contribution to your organization.

Here are our top tips for crafting an effective performance improvement plan:

1. **Be specific and measurable.** Achievable goals need to be clearly articulated, so make sure to define the performance issues with concrete examples or data, and then set SMART goals for resolving them. Avoid vague language, and ensure that success can be objectively measured.
2. **Set goals collaboratively.** You're more likely to experience a successful outcome from your PIP if you involve the individual in the goal-setting process. Encouraging their input gives them greater ownership over their improvement goals, and ensures that they understand and agree with established expectations.
3. **Provide support, guidance, and resources.** The best performers are part of a team, so offer the necessary resources, training, coaching, and mentoring to help your employee achieve the performance expectations. Use the PIP template to outline the support available and how you'll provide it.

Customizing the performance improvement plan template

A positive PIP outcome depends on the individual being given specific feedback on their performance, and an achievable path to successfully improving their work.

As a result, a customized plan is crucial for providing a tailored roadmap for each specific situation.

Customization ensures that the identified performance issues are accurately addressed, and the goals set are realistic and relevant. It also demonstrates a personalized approach, fostering employee engagement and commitment to the improvement process.

By adapting the PIP template to the specific circumstances and objectives, you can maximize the likelihood of successful performance improvement and overall employee growth.



Our free performance improvement plan template

A truly effective **employee development plan template** will be tailored to the specific needs of the professional to whom it relates. Our sample performance improvement plan is a great place to get started. However, feel free to customize it to match your requirements and company policies.

Employee name:		Job title:	
Supervisor:		Department:	
Review period:			

Overview

[Use this section to provide a brief summary of the context for the PIP, and explain that the plan is designed to help the team member improve their performance with clear, achievable goals. This is also a good opportunity to outline the support and resources available to them.]

Areas requiring improvement

- 1.
- 2.
- 3.

[List the specific areas requiring improvement in a concise list.]

Overall performance goals

Goal #1:
Measurement criteria:
Target completion date:

Goal #2:
Measurement criteria:
Target completion date:

Goal #3:
Measurement criteria:
Target completion date:

[Detail the expectations for improved performance in each of the areas listed above, and allocate measurable goals and metrics to each, along with a target completion date.]



Detailed action plan

GOAL #	ACTIVITY	STEPS	START DATE	TARGET FINISH DATE

[Working with the employee, break down the specific actions that they need to take to meet each of the performance expectations.]

Resources and support

[Outline the key sources of support available to the individual, such as a mentor, additional training, or a specific training program.]

Monitoring and review

CHECK-IN DATE	CONDUCTED BY	PROGRESS EXPECTED	NOTES

[Explain the monitoring process, and schedule check-ins to revisit the PIP and track how effectively the individual is hitting these expectations.]

Next steps

[This is a good space for clearly communicating the wider review process and any potential consequences if the expectations laid out in the PIP are not met—as well as what happens after the PIP period ends.]

Employee's acknowledgment

[A section in which the employee acknowledges their understanding of the PIP, their commitment to improving their output, and their agreement to follow the plan.]

Employee's signature:

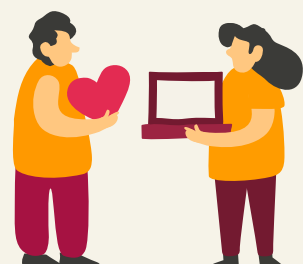
Supervisor's signature:

Performance improvement plan examples

PIPs come in many different forms, depending on the nature of your business and the specific circumstances of each case. Here are key excerpts from some of the most common completed PIP examples that HR teams face, such as a performance improvement plan for attendance issues or missed sales targets.

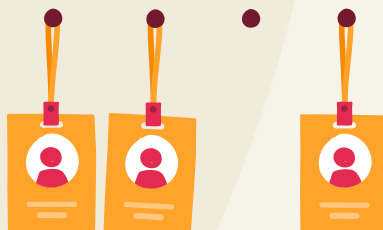
Example #1: Poor customer service

Overview	Persistent negative reviews and complaints from customers Unclear if this is an attitude issue or due to a lack of product knowledge
Areas requiring improvement	Customer service manner, an improved level of customer service
Overall performance goals	1. A reduction in customer complaints from five per week to one 2. An increased average call time from five minutes to 10 minutes
Action plan	1. Two product training sessions with the team to improve expertise 2. Customer service training refresh with supervisor 3. Monitoring of performance over the next four weeks
Resources and support	Training sessions as above, closer observation from supervisor and occasional call-shadowing
Monitoring and review	Weekly review of call logs and customer reviews with supervisor
Next steps	PIP active for 30 days. If no improvement is visible after that point then further training is to be considered.



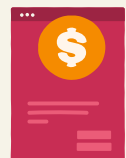
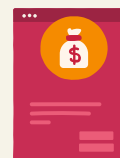
Example #2: Absenteeism and missed deadlines

Overview	The team member has consistently arrived late for work and has had three unexplained absences in the past two months. Similarly, their last two projects have been delivered four days late.
Areas requiring improvement	Attendance record at work, timekeeping, and ability to deliver projects in a way that meets expectations
Overall performance goals	<ol style="list-style-type: none"> 1. Zero unexplained absences over the next 90 days 2. Projects delivered on time, unless reasonable explanations can be given with plenty of notice
Action plan	<ol style="list-style-type: none"> 1. Supervisor to establish the reason for lateness and absences. Is this a transport or childcare issue? Can the organization provide more help? 2. If no definitive issue is uncovered, then the supervisor is to closely monitor the person's attendance and work record for the duration of the PIP.
Resources and support	Depending on the reasons behind the issues, additional support to be considered and provided by HR
Monitoring and review	Weekly check-ins with the supervisor for the duration of the PIP
Next steps	A review to be undertaken by supervisor and HR manager after 90 days



Example #3: Unsatisfactory sales performance

Overview	Sales performance significantly below the team's average
Areas requiring improvement	Sales performance
Overall performance goals	To increase monthly sales revenue by 20 percent within the next 90 days
Action plan	<ol style="list-style-type: none"> 1. Sales training course to improve product and process knowledge 2. Weekly sales targets with progress tracking 3. Role-playing exercises with manager to improve techniques
Resources and support	Weekly coaching sessions with the sales manager and attending an external training course
Monitoring and review	Weekly meetings with sales manager to review performance and progress toward the overall goal
Next steps	After 90 days, it's time to assess how much progress has been made. If the target has not been met, then further training options will be considered.



Tips for successful PIP implementation

Successfully implementing a performance improvement plan at work requires clear communication throughout. Everyone involved in the process needs to understand their role and responsibilities and the desired outcomes.

It's also important to regularly use an **employee performance review checklist** so that you can monitor progress, with ongoing feedback and flexibility to make adjustments where necessary. As you run more PIPs, take lessons on board and be ready to modify your template and approach.

With a coherent training plan supporting the PIP, you're more likely to set your team up for success. Provide proper resourcing, communicate openly throughout, and consider using **employee performance management software** and a successful PIP process is just around the corner.



Meet Bob

An HR platform such as Bob offers a one-stop-shop for all things people. It sits at the center of your HR ecosystem, is fully customizable, and grows with your organization.

In a short time, Bob can be deployed to enable communication, collaboration, and connectivity that drives stronger engagement, productivity, and business outcomes.



For HR

It delivers automation of many common processes, allows greater oversight and visibility of the business, and centralizes all people data in a secure, user-friendly environment.



For managers

It provides access to data and insights to help them lead more effectively and streamline processes.



For employees

It's the tools and information they need to connect, develop, and grow throughout their journey.